

APPENDIX J: THE AUTOMATED CHECKLIST PROGRAM

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APPENDIX J: THE AUTOMATED CHECKLIST PROGRAM

A. Overview

1. *What is the Automated Checklist Program?*

The Automated Checklist Program (ACP) generates the Checklist for Preservation and Protection of Museum Collections (Checklist) for your unit, center, or office. The ACP is a tool for completing the required Checklist. The Checklist is a self-assessment that shows your unit's status in meeting Bureau preservation and protection standards.

See the NPS Museum Handbook, Part I (MH-I), Appendix F: Collections Management Checklists, Section A, or the DOI Museum Property Handbook, Volume I (MPH-I), Appendix E: Museum Property Management Checklist, for more information on the Checklist.

2. *Can I complete the ACP using ICMS?*

Yes. You must complete your Checklist using **ICMS**. The program allows you to:

- complete the Checklist
- maintain a history of responses to questions on the Checklist
- print the Checklist report in a variety of formats for your use
- submit your checklist along with your National Catalog Submission

3. *Will running the ACP change any of my catalog data in ICMS?*

No. While you are in the ACP you cannot change **ICMS** collection level databases. The ACP does not extract any data from collection level databases.

4. *Do I have to use the ACP?*

Yes. All submissions must be electronic.

All Checklists must be kept up-to-date. For NPS, you may submit changes at any time. At a minimum, you must update and submit your Checklist to the PMMP by September 15 along with your National Catalog submission following the fiscal year in which a change occurred. See Section J for NPS submission instructions.

5. *Do I need special security rights to run the ACP?*

Yes. You need Administrator security rights or specific rights selected under Advance Module Permissions in your security profile to run the ACP.

6. *How is the Checklist organized?*

The Bureau standards, or basic requirements, for managing museum collections are represented by each question in the Checklist. You complete this self-assessment to determine which standards your unit meets. If the unit doesn't meet a standard, the unit has a deficiency for that standard. The standards are listed under eight categories:

Administrative offices
Museum collections storage
Exhibits
Museum environment
Security
Fire protection
Housekeeping
Professional assistance and museum planning

The standards under each category (except professional assistance and museum planning) are organized under the following sub-categories:

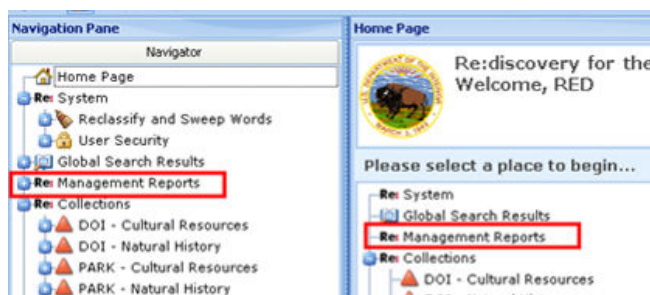
Operations (procedural)
Museum facility
Equipment and supplies

B. Running the ACP

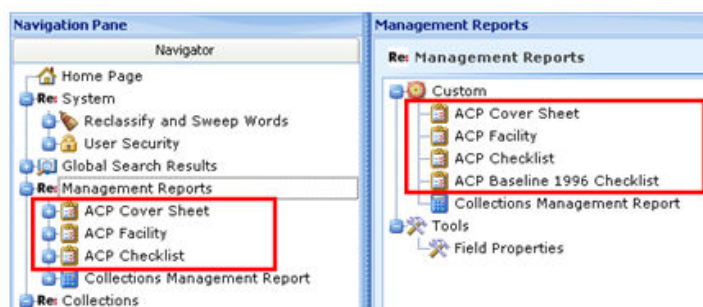
1. How do I access the ACP within ICMS?

To access the ACP:

- On the Home Page, double click the Re: Management Reports, *or*
- In the Navigation Pane, expand the Re: Management Reports module by clicking the + (if necessary).



- In the Management Reports window, double click the ACP Cover Sheet option under Custom, *or*
- In the Navigation Pane, single click the ACP Cover Sheet



Note: Each screen of the ACP is a separate selection under the Management Reports module.

2. What do I need to know to complete the ACP?

If you have not used **ICMS**, review Chapter 1, System Basics, to get an overview of how the system works.

To complete the ACP, you will need to know:

- your unit acronym (a unit is defined as a park, center or office with a museum collection)

Example: GETT – Gettysburg National Military Park
WACC – Western Archeological and Conservation Center

- the name of each facility in your unit that contains museum collections

Example: Visitor Center
Museum Collections Storage Building
Boyhood Home
Superintendent's Office

- the conditions in your facilities with museum collections
- estimated cost to correct each deficiency

Use Figure F.1 in the NPS *Museum Handbook*, Part I, Appendix F, NPS Museum Collections Management Checklists. This table will assist you in estimating costs to correct deficiencies identified in the checklist. The costs shown in the table are average costs that may be increased or decreased in your cost estimates depending on your unit's needs and location.

Figure F.1 is available on-line at:
<http://www.nps.gov/museum/publications/MHI/AppendF.pdf>

Accurate estimates are important. Bureau and Departmental plans and long-range programming and budgeting are based on these data.

3. *How many screens does the ACP have?*

The ACP has three screens:

- cover sheet
- facility
- automated checklist

4. *How do I move between screens?*

To move between screens:

- In the Navigation Pane, single click the ACP screen option under Management Reports, *or*
- On the View menu, select Go To and choose the ACP screen you want to view, *or*
- On the ACP Cover Sheet or ACP Facility screens, click on the Checklist Sub-Records tab or press Ctrl-N to go to the Checklist Sub-Records page. Then click Use These Records to be taken to the ACP Checklist screen. **Note:** The Use These Records option sets a filter on the ACP Checklist records for the park unit or facility you were on. For example, if you have multiple park units represented in different cover sheet records, use this option to set a filter for the current park only. If you are on the facility screen, use this option to set a filter for the checklist questions for that specific facility for the park unit.

On the ACP Checklist screen, use the Previous Question and Next Question links in View or Modify Mode to move between records within the screen. You can also select the record in the List Pane when in View Mode.

5. *How can I view my ACP Baseline data from 1996?*

For NPS, to view the 1996 baseline data,

- From any Management Reports screen, select Go To on the View menu and choose the ACP Baseline 1996 Checklist option, *or*

- Select the Re: Management Reports module in the Navigation Pane, and in the Management Reports window on the right, double click the ACP Baseline 1996 Checklist under Custom.

NPS Note: Baseline data is a record of your ACP data from 1996, the last year that all parks updated their Checklists in response to a Servicewide call. **ICMS** refers to these data as baseline data, since it is the earliest data recorded in the **ICMS** system. These data were used to set an initial baseline for your park for question 1a6 in the Government Performance and Results Act (GPRA) centralized reporting system.

Do not change baseline data. Use baseline data for reference only.

6. *How do I update my Checklist?*

If you...

Then...

have no changes to record on the cover sheet or facilities screens,

go to Section G.

have changes to the cover sheet,

go to Section D.

have changes to the facilities,

go to Section E.

7. *What happens to my previously submitted Checklist when I make changes?*

The program tracks the history of changes. Refer to Section F.8 for information on how the program creates a history of changes.

C. Frequent Questions About the ACP

1. *How will I know if there is information in the ACP?*

If there is information in the program, it will appear when you first enter the ACP Cover Sheet.

2. *If I manage more than one unit, how will I know how many units have information in my ACP?*

The List Pane in the ACP Cover Sheet will display all units with ACP data in your system. Each unit will have a separate cover sheet.

3. *Can I use the button bar and menu bar functions with the ACP?*

Yes. Most of the button bar and menu bar functions work with the ACP. The following functions do not work with the ACP:

- imaging
- word search
- Modify All, Global Search & Replace and Quick Entry (these are only available on the ACP Facilities screen when a subset of records is selected)
- delete is not available on the ACP Checklist screen (you cannot delete questions for a facility).

The ACP does not contain supplemental records or use the associated modules.

4. *Do I have to answer all the questions on the Checklist?*
 For NPS, you must answer all the questions on the Checklist. Some questions allow you to answer NA for “not applicable”.

 For other Bureau units, you only need to answer the questions indicated by “DOI Required Question”. You may wish to answer the other questions for better assessment of your facility preservation and protection standards or if instructed to do so by your Bureau’s museum collection management contact. **Note:** There is a Built In Filter that will show only these questions. See F.2 below.
5. *Why does “Filter” appear at times on the Status Bar at the bottom?*
 Filter indicates that you are working with a subset of your data. It appears on the Checklist screen when you access the questions using the Checklist Sub-Records tab Use these records option from either the Cover Sheet or the Facilities directories. It indicates that you are working with the questions from a specific unit or a single facility only. The questions are in sequential order.
6. *Must I print a copy of my Checklist?*
 For the NPS, if there are changes to your Checklist, you need to print a copy of it annually for the superintendent’s or unit manager’s review and signature. If there are no changes to the Checklist, you don’t need to print it. To print the Checklist, use the report Checklist by Facility in Section H.
7. *What data sorts are available in the ACP?*
 The Cover Sheet directory is sorted by acronym and unit name.

 The Facility directory is sorted by unit acronym, facility number, and facility name.

 You can sort the Checklist directory by:
 - unit, facility, and question
 - question, unit, and facility
 - number (sequentially)

Note: You can use quick sorts in the List Pane on other fields. To change the fields that display in the List Pane, use Update My List View on the View menu.

For additional information on sorts, refer to Section V of Chapter 7.

D. Cover Sheet Screen


1. *What is the Cover Sheet screen?*
 The Cover Sheet screen contains information about the unit, such as name and address. It also contains data on who completed and approved the Checklist.

Note: A unit is a park, center, or office with a museum collection. A unit will have a number of facilities that house museum collections.
2. *When do I complete the Cover Sheet screen?*
 Complete the Cover Sheet screen if you are adding a new unit to the ACP for the first time. For example, complete the Cover Sheet screen if your unit is a newly established park, administrative unit, or office with a museum collection.

Note: Do not complete a new cover sheet for changes in address or personnel. Modify the existing cover sheet. Refer to Section D.6 for information on modifying a cover sheet.

3. How do I add a unit?

To add a unit:

- Click on the Add button  on the button bar, *or*
- Go to Edit on the menu bar and choose Add New Record, *or*
- Press the F9 key.

A new window will open with a blank cover sheet. Add Mode will appear in the Status Bar at the lower right. You can then create and save a new cover sheet.

4. How do I complete the data fields on the Cover Sheet screen?

Follow the field-by-field instructions for completing the fields on the Cover Sheet screen. Help for each field is also available in the Navigation Pane on the right.

Press the Tab key to move to the next field. Press Shift-Tab to move back a field.

Unit

Single entry authority table. (F5, Ctrl-F5)

Select the four-letter acronym of the unit (park, center or office).

Example: CASA

As you type, the entry will complete from the authority table. To view and select entries from the table, click the down arrow or press F5. If you need to add a new unit to the table, press Ctrl-F5 or right-click and choose Browse Authority Table. Then click Add Term. When finished click Save Change.

Unit Name

Enter the name of the park, center, or office that manages the museum collection. Each unit will have one or more facilities where collections are stored. This is the name that will appear on the cover sheet for the entire Checklist.

Address 1

Enter the first line of the unit's address.

Address 2

Enter the second line of the unit's address.

City

Enter the unit's city or town.

| | |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>State</i> | Enter the unit's two character state postal code. |
| <i>Zip</i> | Enter the unit's US Postal zip code. |
| <i>Telephone</i> | Enter the unit's phone number. This may be the phone number of the person who completed the Checklist. |
| <i>Extension</i> | Enter the phone number extension, if applicable. |
| <i>Fax</i> | Enter the unit's fax number. |
| <i>Fax ext.</i> | Enter the fax extension, if applicable. |
| <i>1) Comp. by</i> | <p>Enter the name of the person who completed the Checklist. Enter the first name and then the last name.</p> <p>Note: This field is automatically updated when you modify a question on the Checklist screen. When you click modify on a question, a prompt window appears for you to enter the Comp. by name. The name you enter is updated on the Cover Sheet.</p> |
| <i>1) Date</i> | <p>Enter the date the Checklist was completed. Enter a two-digit month, a two-digit day and the full year. The date will autofill as you type. To view a calendar and choose the date, click the calendar icon next to the field.</p> <p>Example: 10/15/2009</p> <p>Note: This field is automatically updated when you modify a question on the Checklist screen. The current date is filled in after you enter the Comp. by prompt that appears when you modify a question.</p> |
| <i>1) Title</i> | Enter the title of the individual who completed the Checklist. |
| <i>2) Comp. by</i> | Enter the name of a second person who worked on the Checklist, if applicable. |
| <i>2) Date</i> | <p>Enter the date that the second individual completed the Checklist. Enter a two-digit month, a two-digit day and the full year. The date will autofill as you type. To view a calendar and choose the date, click the calendar icon next to the field.</p> <p>Example: 10/15/2009</p> |
| <i>2) Title</i> | Enter the title of the second person who worked on the Checklist, if applicable. |
| <i>Approved</i> | Enter the name of the person who approved the Checklist. This person is usually the superintendent or unit manager. Complete this information after the Checklist has been approved. |
| <i>Appr date</i> | <p>Enter the date the Checklist was approved. Enter a two-digit month, a two-digit day and the full year. The date will autofill as you type. To view a calendar and choose the date, click the calendar icon next to the field. Complete this information after the Checklist has been approved.</p> <p>Example: 10/15/2009</p> |

Prev Cover


This field tracks changes in the Approved Name and Date and displays them in the box. The system automatically completes this field when you save the record.

5. *How do I save the information on the Cover Sheet screen?*

Once you have entered all of the information on the Cover Sheet screen, click Save and Close at the bottom. The window closes and you are returned to the main screen for the ACP Cover Sheet. You can then go to the Facility or Checklist screen to continue entering data.

6. *How do I change information on the Cover Sheet screen?*

To change information on the Cover Sheet screen:

- Click on the modify button  on the button bar, *or*
- Go to Edit on the menu bar and choose Modify This Record, *or*
- Press the F10 key.

The record will open in a separate window and you will see Modify Mode in the lower right corner. You can then modify the record and save the changes that you have made.

7. *How do I delete a unit cover sheet?*

To delete a unit cover sheet:

- In View Mode, select the Cover Sheet in the List Pane for the unit you want to delete.
- Go to Edit on the menu bar and choose Delete Record(s).
- Then choose Delete This Record.
- The program will ask if you are sure you want to delete the record. Click Yes to delete the unit cover sheet. Click No to return to the screen.

8. *How do I enter a cover sheet if I manage collections from more than one unit?*

If you manage collections for more than one unit, you will have to enter a separate cover sheet for each unit.

9. *What is the Checklist Sub-record tab?*

The Checklist Sub-record tab allows you to view the Checklist questions associated with this unit. From this page you can view and edit individual questions. If you click Use These Records, you will be taken to the Checklist screen with a filter set for these questions as your visible data.

E. Facility Screen

1. *What is a facility?*

A facility is a structure that houses museum collections, such as a visitor center, rooms in a historic home, a barn, or unit headquarters. A facility is defined as an exhibit space, museum storage space, or administrative office. Each facility type will have a different list of questions you must answer.

If one building houses more than one kind of space, you must complete a separate list of questions for each space in the facility. For example, a visitor center may have both exhibits and museum storage. You would complete a list of questions for the exhibit space and a list of questions for the storage space.

Use the Facility screen to document information about the:

- location of each facility in the unit
- person who completed the list of questions for each facility
- date the list of questions for the facility was completed.

2. *How will I know how many facilities are included in the ACP for my unit?*


The List Pane in the ACP Facility directory displays all facility records for the unit. You may need to add and/or delete facilities.

3. *When do I complete the facility screen?*

If you have not previously completed a Checklist, you will have to add facilities. You will also have to add a new facility if you move collections to a new facility or you add a different type of space to an existing facility. For example, if you add a storage space to a facility that only housed exhibits, you will need to add a new facility record for the storage space.

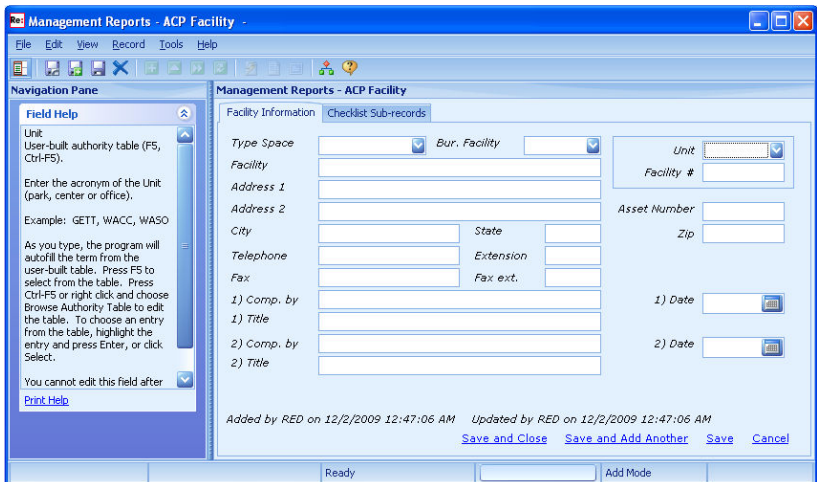
4. *How do I add a facility?*

To add a facility:

- Click on the Add button  on the button bar, *or*
- Go to Edit on the menu bar and choose Add New Record, *or*
- Press the F9 key.

A new window will open with a blank facility screen. Add Mode will appear in the Status Bar at the lower right. You can then create and save a new facility record.

The first facility that you add for each unit will be the unit facility. Although the unit is not a true facility, you must include it at the top of the facility list. This allows the system to correctly prompt for the Checklist standards that pertain to the entire unit (all facilities on the Checklist). The program will autofill 0 for the facility number and U (Unit) for the type of space. Once saved, you cannot delete the unit facility record.



5. *How do I complete the data fields on the Facility screen?*

Follow the field-by-field instructions for completing the fields on the Facility screen. Help for each field is also available in the Navigation Pane on the right.

Press the Tab key to move to the next field. Press Shift-Tab to move back a field.

Unit

Single entry authority table (F5, Ctrl-F5).

Select the four-letter acronym of the unit (park, center or office).

Example: GETT

As you type, the entry will complete from the authority table. To view and select entries from the table, click the down arrow or press F5. If you need to add a new unit to the table, press Ctrl-F5 or right-click and choose Browse Authority Table. Then click Add Term. When finished click Save Change.

Facility #

System generated.

The system enters the next sequential number for the unit. You cannot edit the data in this field.

Type Space

Locked Bureau table. (F5)

Enter the type of museum space that houses collections in the facility. Choose from the table of entries:

- A = Administrative
- E = Exhibit
- S = Storage
- U = Unit

Note: The system automatically enters the “U” for the unit facility. You cannot change this entry.

Click the down arrow or press F5 to view and select a code from the table. The entry will also complete as you type. You cannot edit this field after the record is saved.

The entry in the Type Space field determines the list of questions you will answer for the facility.

Note: If a facility’s type changes, you must create a new facility record. This will generate a new set of questions. Changing the Type Space entry on an existing record won’t generate the appropriate questions on the Checklist. For example, if a barn used for museum storage becomes an exhibit space, you must create a new facility record.

Bureau Facility (Bur. Facility)

Bureau controlled authority table (F5)

You may not add to, delete, or modify terms in this table.

Choose between Yes or No as defined here.

No Answer "no" if the facility is not owned or leased by the Bureau.

Yes Answer "yes" if the facility is owned or leased by the Bureau.

| | |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Facility</i> | <p>Enter the name of the facility that houses museum collections.</p> <p>Example: Visitor Center Museum Collections Storage Building Boyhood Home Superintendent's Office</p> <p>Note: If you are managing multiple facilities, you may want to add the unit acronym in front of each facility name. When you run multiple facilities reports, you can then distinguish between facilities by unit.</p> |
| <i>Address 1</i> | Enter the first line of the facility's address. |
| <i>Address 2</i> | Enter the second line of the facility's address. |
| <i>Asset Number</i> | Enter the Asset Number assigned to this facility. For NPS, this is the Facility Management Software System (FMSS Asset Number). |
| <i>City</i> | Enter the facility's city or town. |
| <i>State</i> | Enter the facility's two character state postal code. |
| <i>Zip</i> | Enter the facility's US Postal zip code. |
| <i>Telephone</i> | Enter the facility's telephone number, if applicable. |
| <i>Extension</i> | Enter the telephone number extension, if applicable. |
| <i>Fax</i> | Enter the facility's fax number, if applicable. |
| <i>Fax ext.</i> | Enter the fax extension, if applicable. |
| <i>1) Comp. by</i> | Enter the name of the person who completed the Checklist for the facility. |
| <i>1) Date</i> | <p>Enter the date the Checklist was completed for the facility. Enter a two-digit month, a two-digit day and the full year. The date will autofill as you type. To view a calendar and choose the date, click the calendar icon next to the field.</p> <p>Example: 07/01/2009</p> |
| <i>1) Title</i> | Enter the title of the person who completed the Checklist for the facility. |
| <i>2) Comp. by</i> | If a second person entered information or assisted with completing the Checklist for the facility, enter the second name here. |
| <i>2) Date</i> | <p>Enter the date the second individual completed the Checklist for the facility. Enter a two-digit month, a two-digit day and the full year. The date will autofill as you type. To view a calendar and choose the date, click the calendar icon next to the field.</p> <p>Example: 07/02/2009</p> |
| <i>2) Title</i> | Enter the title of the second person who assisted with completing the Checklist for the facility. |


6. *How do I save the information on the Facility screen?*

Once you have entered all of the information on the Facility screen, click Save and Close at the bottom. The program will save the facility record and create a Checklist for the facility. The program returns to the main screen. You can then go to another Facility screen or the Checklist screen to continue entering data.

Remember to complete a Facility record for each facility within your unit.

7. *How do I change information on the Facility screen?*

To change information on the Facility screen:

- Click on the Modify button  on the button bar, *or*
- Go to Edit on the menu bar and choose Modify This Record, *or*
- Press the F10 key.


The record will open in a separate window and you will see Modify Mode in the lower right corner. You can then modify the record and save the changes that you have made.

8. *How do I delete a facility?*

Note: The program won't allow you to delete the unit facility. The Delete option is unavailable for the unit facility.

To delete a facility:

- In View Mode, select the Facility in the List Pane for the facility you want to delete.
- Go to Edit on the menu bar and choose Delete Record(s).
- Then choose Delete This Record.
- The program will ask if you are sure you want to delete the record. Click Yes to delete the facility. Click No to return to the screen.

The Checklist questions for the facility will also be deleted at the same time. (When you go to the Checklist screen, you will have to click the Refresh button  on the button bar to remove questions for the deleted facility.)

9. *What is the Checklist Sub-record tab?*

The Checklist Sub-record tab allows you to view the Checklist questions associated with this facility. From this page you can view and edit individual question. If you click Use These Records, you will be taken to the Checklist screen with a filter set for these questions only as your visible data.

F. Checklist Screen

1. *What is the Checklist?*

The Checklist is a compilation of Checklist answers for each type of space in each facility within your unit that contains museum collections. The questions are dependent on the facility and the type of space in that facility. You'll see the name of the facility next to the unit acronym at the top of the screen. The number of the facility appears in the Facility # field in the upper right corner of the screen, along with the unit acronym.

2. *How do I complete a Checklist for my unit?*

Before completing the Checklist, you must complete a:

- cover sheet for your unit (Section D)


- facility record, or multiple facility records, for your unit (Section E)

You will answer different questions on the Checklist for each facility depending on the type of facility and how you answered previous questions.

Go to the Checklist screen using one of the following methods:

| If you want to... | Then... |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| work on one facility's questions at a time, | start at the Facility screen that you want to work on. Click on the Checklist Sub-records tab and click <u>Use These Records</u> . You will be taken to the Checklist screen and a filter will be set for that facility's questions only. When you are ready to work on a different facility, return to the Facility screen using the Navigation Pane, select the next facility and follow these same steps. |
| work on all questions for a unit, and manage only one unit, | select the ACP Checklist option in the Navigation Pane. All questions for your unit will be loaded in facility order. You can change the order to work on the same question for each facility by selecting By Question/Unit/Facility in the Sort list on the button bar. |
| work on all questions for a particular unit, and you manage multiple units, | start on the Cover Sheet for the unit you wish to work on. Click the Checklist Sub-records tab and click <u>Use These Records</u> . You will be taken to the Checklist screen and a filter will be set for all questions in that unit only. When you are ready to work on a different unit, return to the Cover Sheet screen using the Navigation Pane, select another unit cover sheet and follow these same steps. |
| work on only DOI Required Questions | first select whether you want to work on a single facility's questions or the entire unit's questions by using one of the options above. Then, in the Navigation Pane, expand the ACP Checklist node by clicking the +. Expand Built In Filters by clicking the +. Select 'DOI Required Questions' under Built In Filters. |

To complete the Checklist:

- On the Checklist question, click the modify button  on the button bar, *or*
- Go to Edit on the menu bar and select Modify This Record, *or*
- Press F10.

You will get a prompt window to enter the 1) Comp. by person. This information will update the 1) Comp. by field on the Cover Sheet for the unit. Click Close after entering your name.

The question will open in a separate window and you will see “Modify Mode” in the lower right corner. You can then complete and save the record.

Note: You do not have to press the Save link after each question. In Modify Mode, use the Next Question and Previous Question links at the bottom of the page to move between questions. Click Save and Close to save the entire Checklist when you are finished.

3. *Can I save a partial Checklist and return later to finish?*

Yes. Click Save and Close to save the data you have entered. You can exit the program and then return at a later date and continue entering data.

4. *What questions will I answer for each type of facility?*

You will answer different questions on the Checklist depending on the type of facility (unit, administrative, storage, or exhibit). The system generates the list of questions for each facility when you save the facility record. The letter you enter in the Type Space field on the Facility screen determines which questions will be available. These questions will come up automatically.

If the type of space is...

Then...

Unit

you'll answer Section H. Professional Assistance and Museum Planning

Administrative

you'll answer Section A. Administrative Offices

Storage

you'll answer Sections:
B. Museum Collections Storage
D. Museum Environment
E. Security
F. Fire Protection
G. Housekeeping

Exhibit

you'll answer Sections:
C. Exhibits
D. Museum Environment
E. Security
F. Fire Protection
G. Housekeeping

5. *Why can't I answer some of the questions on the Checklist?*

Certain fields are open or closed depending on the question and how you answered associated questions.

A field is closed if it is grayed out. You cannot add data to a closed field.

For example, you cannot enter a cost for most of the questions that are Operations (Procedural). This is because you must correct these deficiencies with the unit's base funding. You can correct procedural deficiencies, such as producing written opening and closing procedures, at minimal cost.

6. *Why can't I answer any of the questions for a facility?*

If the facility is Administrative, Storage or Exhibit, there is a prequestion that must be answered before you can complete the questions for this facility. This prequestion (which is not numbered) asks if there are museum collections stored or displayed in that facility.

If you answer... Then...

Yes, you must complete the remaining Checklist questions for that facility.

No, you do not complete this section of the Checklist for this facility. All remaining questions are locked.

7. *How can I view questions for the Checklist?*

The questions for the Checklist are displayed in the List Pane. You can scroll up and down in the list or use the Next and Previous buttons on the button bar. To view a question, select it in the List Pane and it will be displayed in the Record Pane below.

Note: You can also use the [Previous Question](#) and [Next Question](#) links on the Checklist screen to move between records.

8. *What is the History link?*

When you update your current Checklist, the program stores the previous answers. You may refer back to them at any time. For example, you may want to see the history of the funding spent to correct a particular deficiency.

9. *How do I use the History link?*

To use the History link:

- Click on the History link at the bottom of the Checklist screen to see the past responses to a question.
- Use the Previous History and Next History links to move between history records for a question.
- Click the red X on the window to close the Question History and return to the main screen.

G. Completing the Checklist

1. *How do I complete the data fields on the Checklist screen?*

Follow the field-by-field instructions for completing the fields on the Checklist screen. Help for each field is also available on the right in the Navigation Pane. Press Tab to move to the next field. Press Shift-Tab to move back a field.

Note: Certain fields are open or closed depending on the question and how you answered associated questions. If the field is grayed out, then it is closed. You cannot add data to it.

Complete the fields as follows:

Answer

Bureau controlled table. You may not add to, delete, or modify the Bureau entries for this field.

As you type, the entry will complete from the Bureau table. Click the down arrow or press F5 to access the table and select an entry.

Choose Yes, No, or NA (not applicable) as defined below:

- Yes indicates that the facility meets the Bureau preservation and protection standard.
- No indicates that there is a deficiency. The space in the facility doesn't meet the Bureau preservation and protection standard.
- NA (Not Applicable) indicates that the question doesn't apply to this particular facility.

NA is not an available choice for all questions.

If you answer... Then...

Yes, click on the Next Question link to proceed.

No, complete the other fields on the screen to record the deficiency and track progress towards correcting it.

Deficiency

Memo field (F12 to expand).

Describe a deficiency when the existing condition does not meet standards and requirements for preservation and protection of museum collections. When you answer NO to a question on the checklist, you indicate that the spaces in the facility do not meet the preservation and protection standards for museum collections as stated in the DOI *Museum Property Handbook*, Volume I or the NPS *Museum Handbook*, Part I. Briefly describe the deficiency in this field.

Example: Museum storage cabinets sit directly on the floor of the storage room.

Action

Memo field (F12 to expand).

Briefly describe the actions (process or steps) proposed to correct the identified deficiency in the above field.

Example: Request MCPPP funds for FY__ to purchase lumber, plywood and paint to construct wooden platforms to raise all museum cabinets 6" off the floor, and for maintenance to build platforms and move cabinets.

Comments

Memo field (F12 to expand).

Enter comments or notes that illustrate or explain facts, opinions, or impressions about the deficiency and action. Use this field to make notes to clarify the intention of the action and assist the user or future users.

Example: Maintenance division has indicated it can build and move cabinets when supplies are available. Winter is easier for maintenance to schedule this type of work; scheduling will be more difficult in the warmer months.

**Cost Included in Question
(Cost in Question Nbr)**

Straight entry field. Enter a one or two digit Facility number, a one letter Category, and a one or two digit Question number.

For example:

1B13

12C3

If the cost of resolving this deficiency is included in the cost estimate of another Checklist question, enter the facility number, category, and question number of the other Checklist question.

Note: Accurate cost estimates are important. Bureau and Departmental plans and long-range programming and budgeting are based on these data.

Cost

Straight entry numeric field.

Note: Not all deficiencies cost money to correct. You will be unable to access the cost field if the deficiency doesn't cost money to correct.

Enter the estimated dollar amount you will need to correct the deficiency. Base the cost on the action(s) that you'll need to take to correct the deficiency. The program automatically enters commas.

Accurate cost estimates are important. Bureau and Departmental plans and long-range programming and budgeting are based on these data.

Use Figure F.1 in the NPS Museum Handbook, Part I, Appendix F, NPS Museum Collections Management Checklists. This table will assist you in estimating costs to correct deficiencies identified in the checklist. The costs shown in the table are average costs that may be increased or decreased in your cost estimates depending on your unit's needs and location.

Figure F.1 is available on-line at:

<http://www.nps.gov/museum/publications/MHI/AppendF.pdf>

Prices of equipment and supplies in Figure F.1 don't include shipping. Units should contact vendors for estimates of shipping to the site. Pricing, except where covered by contracts, is approximate and based on current prices of a range of acceptable models, types or materials from several vendors. Refer to the NPS Tools of the Trade or DOI's Tools of the Profession for a list, descriptions, and vendor sources of equipment and supplies.

In addition, consult with park maintenance and protection staff as well as the Regional Curator for assistance with estimating costs. If you identify several deficiencies, it may be necessary to rehabilitate an existing facility or to construct a new facility. You can also get cost estimates from:

- programming documents, such as Development/Study Package Proposal
- budgets for new construction projects and repair/rehabilitation projects

Funding Spent Previous FY

Straight entry numeric fields. There are two fields under this heading: a fiscal year and a cost field.

FY (Fiscal Year)

Enter the previous fiscal year that funding was spent to correct the deficiency.

Example: 2008

\$ Spent

Enter the total dollars that your unit spent in the fiscal year above to correct the deficiency.

Do NOT enter the amount of funding received. Often the funding received and the amount spent are different.

Previous estimate to correct deficiency

Straight entry numeric field.

If the estimated cost to correct this deficiency has changed since you last updated the Checklist, enter the earlier estimate here.

% of deficiency corrected

Straight entry numeric field.

Enter the percentage of the deficiency that has been corrected to date. Enter the percentage each year until you reach 100%.

Go to the next question by clicking on the [Next Question](#) link.

2. *If I'm answering questions for a single facility, how do I get to the questions for the next facility?*

When the Next Question link is no longer active, you have reached the last question for a single facility or multiple facilities. Click [Save and Close](#) to save the records for the current facility.

To get to the Checklists for other facilities:


- Go to the Facility screen and select another facility in the List Pane.
- Once you have the facility you want in the Record Pane, click on the Checklist Sub-records tab.
- Click [Use These Records](#) and you will be taken to the Checklist screen with the questions for this facility loaded as your visible data. A filter is activated for this facility only and you will see Filter on the Status Bar at the bottom of the screen.

3. *What should I do when I have completed all of the information on the Checklist?*

Once you have entered all of the information on the Checklist, click [Save and Close](#) to save the records.

4. *How do I change information on the Checklist?*

To change information on the Checklist that you have saved:

- Click the Modify button  on the button bar, *or*
- Go to Edit on the menu bar and choose Modify This Record, *or*
- Press F10.

A separate window will open in “Modify Mode” for that record. You can then modify the record and save any changes that you have made.

H. Reports

1. *What reports are available within the ACP?*

There are numerous reports available within the ACP. You must access a report from the appropriate ACP screen.

The complete printed Checklist consists of four reports: the Cover sheet, the List of Facilities, the Facility cover sheet (one for each facility), and the Checklist (one for each facility).

2. *What reports are available from the Cover Sheet screen?*

There is only one type of report available from the Cover Sheet screen:

Cover

Use this report to print the Checklist cover sheet. Print one cover sheet for each unit's Checklist. Select the form appropriate for your unit:

Cover (for NPS)
BOR Cover
DOI Cover

BOR Note: There are two additional forms that can be printed from the Cover Sheet. These are for contact information for facilities.

Reclamation Facility Information
Non-Reclamation Facility Information

3. *What reports are available from the Facility screen?*

There are two types of reports available from the Facility screen:

Facility

Use this report to print the Checklist facility cover sheet. Print one facility cover sheet for each facility's Checklist. Select the form appropriate for your unit:

BOR Facility
DOI Facility
Facility (for NPS)

Facilitylist

Use this report to print Table 1: Unit Facilities Housing Museum Collections. The report is a list of facilities that includes the number, name, type, and type of museum space for each facility.

4. *What reports are available from the Checklist screen?*

There are 11 reports and a blank Checklist form available from the Checklist screen:

Note: The current facility is the facility on the screen at the time you run the report.

BLANK CHECKLIST.doc

Use this report to print a 27-page blank Checklist form.

Checklist by Facility

Use this report to print a Checklist by Facility. Run the report with only a single facility's questions selected. The report prints the basic Checklist form for the current facility.

To select the questions for a single facility, on the Facility screen, go to the Checklist Sub-records tab. Click Use These Records to select the questions for a single facility. Then run the report (see H.6 below). Follow the same procedure for each facility.

Checklist by Facility is the standard Checklist that you print for the superintendent's or unit manager's review and signature.

Checklist by Question

Use this report to print a Checklist for All Facilities by Question. Run the report with all questions for your unit selected. To do this:

- Deactivate any active filter by going to Record on the menu bar and selecting Deactivate Filter.
- On the Button bar, change the sort to By Question/Unit/Facility, or choose Sort under Record on the menu bar and select this sort option.

Checklist for Deficiencies

Use this report to print a Checklist for Deficiencies. Run the report on a single facility. The report prints one Checklist for the current facility, showing only questions with a "No" response.

To select the questions for a single facility, on the Facility screen, go to the Checklist Sub-records tab. Click Use These Records to select the questions for a single facility. Then run the report (see H.6 below). Follow the same procedure for each facility.

Checklist with History

Use this report to print a Checklist with History. Run the report on a single facility. The report prints one Checklist for the current facility, with a history of past responses for each question.

To select the questions for a single facility, on the Facility screen, go to the Checklist Sub-records tab. Click [Use These Records](#) to select the questions for a single facility. Then run the report (see H.6 below). Follow the same procedure for each facility.

Deficiency Report

Use this report to print an ACP Deficiency Report. Run the report on all facilities. It includes the completion date from the Cover Sheet screen. The report sums:

- Applicable Standards (all questions without NA response)
- Standards Met (all questions with YES response)
- Deficiencies (all questions with NO response)
- % Standards Met

Note: To make this report run accurately you must answer every question on the Checklist. To make sure you have selected all facilities, cancel any filter by selecting Deactivate Filter on the Record menu.

The deficiency report excludes questions B.4 and C.2 from the Applicable Standards. The question asks if the space is outside the 100-year floodplain, and occurs once for each storage or exhibit facility.

Estfund

Use this report to print an Estimate of Total Funding Needed to Correct Deficiencies. Run the report on multiple facilities. The report prints one page of estimated funding per facility with subtotals by category and facility. The unit total prints on the last page. Select the form appropriate for your unit:

BOR Estfund Estfund (NPS)

To make sure you have selected all facilities, cancel any filter by selecting Deactivate Filter on the Record menu.

Estfund2

Use this report to print an Estimate of Total Funding Needed to Correct Deficiencies. Run the report on a single facility. The report prints one page of estimated funding per facility with subtotals by category. It doesn't include a unit total. Select the form appropriate for your unit:

BOR Estfund2 Estfund2 (NPS)

To select the questions for a single facility, on the Facility screen, go to the Checklist Sub-records tab. Click [Use These Records](#) to select the questions for a single facility. Then run the report (see H.6 below). Follow the same procedure for each facility.

Estfund3

Use this report to print an Estimate of Total Funding Needed to Correct Deficiencies. Run the report on multiple facilities. The report prints a one page summation of estimated funding for all facilities, with subtotals by category. It prints the unit total at the bottom of the page. Select the form appropriate for your unit:

BOR Estfund3 Estfund3 (NPS)

To make sure you have selected all facilities, cancel any filter by selecting Deactivate Filter on the Record menu.

Supercover

Cover sheet memo to superintendent or unit manager requesting his/her review and signature. Use this report along with the Superintendent Summary report.

Superintendent Summary

Use this report along with the Supercover to print a summary of all deficiencies listed by question and facility for review by the superintendent or unit manager. The report includes the cost to correct each deficiency, the facility number and name. A summary of deficiencies and a total cost to correct all deficiencies appear at the end of the report. Run the report on multiple facilities.

To make sure you have selected all facilities, cancel any filter by selecting Deactivate Filter on the Record menu. You must also change the sort to By Questions/Park/Facility on the button bar or from the Sort option on the Record menu.

Unanswered Questions

Use this report to print a list of unanswered questions. The report will identify questions that haven't been answered. You can then return to modify the questions and provide an answer for the questions in the report. You can run this on multiple facilities.

To make sure you have selected all facilities, cancel any filter by selecting Deactivate Filter on the Record menu.

5. Can I run reports on multiple facilities for one unit at a time?

Yes. You can run reports on multiple facilities for a single unit. You may want to do this if you manage multiple units.


To view multiple facilities for a single unit:

- on the Cover Sheet screen for one unit, go to the Checklist Sub-records tab
- click Use These Records to select all questions for that unit.

The Checklist questions will load with a filter activated for the entire unit.

6. How do I run a report?

To access and print a report:

- Click on the Rediscovery Reports button  on the button bar, or
- Go to Record on the menu bar, select Reports and then Rediscovery Reports
- Select the report in the list you wish to run
- Depending on the report you are running, click either Run for Current Record Only to run the report for the record in the Record Pane, or Run For All Visible Records to run the report for all the records in your database.

Don't run a blank report for any of the ACP reports. The reports are designed to pull information from the ACP. The program includes a prewritten Blank Checklist report that you can choose if you need a blank report.

- Select Printer or Screen, then click on the Print button. Follow the Windows procedures for printing a report.

7. *Can I create my own reports?*

Yes. You can quickly create your own reports by using the Quick Report function. Refer to Chapter 5, Printing and Reports, for information on Quick Report.

I. Using ACP Information

1. *How do I use the information in the ACP?*

Use the reports generated in the ACP to help you plan to improve the preservation and protection of your museum collection. As you carry out projects that remove the deficiencies on the Checklist, you will:

- improve care of the collection
- meet accepted museum standards

You can use Checklist information in a variety of ways. For example, use it to:

- develop project statements and cost estimates for planning documents
- set priorities, such as identifying security and fire protection deficiencies for priority attention
- brief managers, planners, conservators, and contractors on conditions in the museum collections

2. *How can the ACP help me with GPRA?*

The NPS has a Servicewide Strategic Plan in response to the Government Performance and Results Act (GPRA). The NPS tracks annual performance on the goals in that plan. Goal 1a6 "X% of preservation and protection conditions in museum collections meet professional standards," uses Checklist data to track performance.

The Deficiency Report is specifically designed to give you the answers that you need to update information for question 1a6 in the GPRA centralized reporting system. Refer to Section H.4 above for information about this report.

The following labels in the Deficiency Report correspond to the labels in the GPRA tracking system.

| <i>Label in ACP</i> | <i>Label in GPRA system</i> |
|----------------------------|------------------------------------|
| Applicable Standards | Total Number of Units in Baseline |
| Standards Met | Status in Base Year |

For additional assistance with GPRA goals, see your GPRA coordinator.

3. *Who else will use the information in the ACP?*

For NPS, the Park Museum Management Program (PMMP) collects Automated Checklist information for the entire NPS. PMMP uses the information to:

- track Servicewide conditions in museum collections

- measure strategic plan progress or goals
- identify collections needs
- develop funding requests

Cluster and regional contacts may collect ACP information to help your unit organize local strategies for support and funding or to organize cluster or regional strategies.

Conservators, planners, and others providing technical assistance will use the Checklist for background before a Collection Condition Survey, Collection Management Plan, Collection Storage Plan, General Management Plan and other plans. In turn, these specialists will provide new information that you will need to add to the Checklist.

J. Approving and Submitting the Checklist

1. *How often must I update my Checklist?* You must keep your Checklist up-to-date. You should update your Checklist whenever you need to make a change to the data. You may want to do this on a monthly basis or as the changes occur.
2. *How often must I submit my Checklist?* For NPS, you should submit an electronic copy of the Checklist to the PMMP each time you update it.

For other Bureau units, contact your museum collections management contact for checklist submission requirements.

For NPS, you must update and submit an electronic copy of your Checklist to the PMMP along with your National Catalog submission by September 15 following the fiscal year in which you made changes to the Checklist.

3. *When do I have the Checklist approved?* After you have completed the Checklist information, provide a paper copy to the superintendent or unit manager for approval and signature on the cover sheet. After signature, enter the name of the approving official in the Approved field and the date of approval in the Appr date field. Keep the signed Checklist on file.
4. *How do I submit the ACP with the National Catalog submission?* For NPS, you will submit your ACP along with your National Catalog submission. The ACP is included in the backup you make for the National Catalog submission. Refer to Chapter 9, Section II.E National Catalog Submission.

If you update the ACP during the year and want to submit it without the National Catalog submission, back up the ACP using the instructions below.
5. *How do I backup the ACP separately?* To backup your updated ACP separately:
 - Choose Backup Data on the File menu.



- In the Backup Data window, choose the Selected Directories (select below) option.
- Check the Management Reports module in the Modules list.

Note: You must be logged in with administrator rights to see the Management Reports option in the modules list.

- Select the location to save the backup file by typing a path in the location field or clicking Browse to select a location.
- Uncheck the “Use default backup zip filename” option so you can include your unit acronym in the file name.
- Enter a new filename in the “Backup zip filename to use” box. Be sure to include your unit acronym, ACP and the date in the file name.

Example: **GRCA-ACP-3-11-2007.zip**

- Click Start Backup.
- You will receive a warning message that this may take a long time without the option to cancel. Click Yes to proceed with the backup.
- Once the backup has completed, you will receive a confirmation message with the name and location of the zip file. Click OK.

If you manage checklists for more than one unit acronym, and need to send the data for only one unit to another ICMS user (such as a regional curator), follow this procedure: (NPS Note: This process should not be used in place of the standard submission process described above when sending your ACP to PMMP.)

From the ACP Cover Sheet screen, select the cover sheet for the unit you need to send. Select the Checklist Sub-records tab and click Use These Records. The checklist questions for that unit acronym will load.

From the File menu, choose Transfer, then Transfer Record(s) to Disk.

Choose to transfer the selected records (not just the Current Record), and enter or Browse for a folder to store the resulting transfer zip file. Click Start Transfer to create the transfer zip file.

The resulting zip file can be loaded into another ICMS system using the File, Transfer, Transfer Record(s) from Disk option.

6. *Where do I submit my ACP?* If you are submitting your ACP separately:

For NPS:

- Use Windows Explorer or My Computer to locate your backup zip file created in step 5 above. Highlight the zip file. Copy the file using Ctrl-C on the keyboard; or right-click and choose Copy; or choose Copy from the Edit menu. **Note:** You will not see anything happen. The file is copied to the Windows clipboard waiting to be pasted.
- Open your Internet browser (such as Internet Explorer). Type the following address:

ftp://204.176.104.69/catalogsubmissions/

Enter the user name: NCSNPS

Enter the password: NCSNPS!1

Note: You may see other park zip files at this site.

- Paste your file using Ctrl-V on the keyboard; or right-click and choose Paste; or choose Paste from the Edit menu. You'll see your file copying onto the ftp site. Copying may take several minutes. When it is done, you will see your file on the site. Then close your Internet browser.

Send an email notification to WASO CMR-NC Submission that you have posted a new ACP. In your email, please indicate the name of the file you posted.

Note: If you are submitting an ACP for more than one unit, please include the unit name and acronym for all units included in your submission.

For other Bureau units, consult your museum collections management contact for submission information.